Southeastern Actuaries Conference
2020 Annual Meeting
Speaker Bios

Southeast by Southwest: Professionalism Topics

Cande Olsen, Actuarial Resources Corporation of Georgia

Cande Olsen, MAAA, FSA, is currently a member of the Actuarial Standards Board and the Academy's Council on Professionalism, formerly VP Life and Board Member of the Academy. She is a consultant with Actuarial Resources Corporation of Georgia where she consults on individual life and annuity regulatory actuarial and compliance issues.

Lisa Slotznick, PricewaterhouseCoopers

Lisa Slotznick, MAAA, FCAS, is currently a member of the Committee on Qualifications, formerly VP Casualty and Board member of the American Academy of Actuaries. She is a practicing casualty actuary with PricewaterhouseCoopers in the Southeast based in Atlanta with a focus on financial reporting for insurers and corporate entities who retain risk.

Regulatory Impacts of Election Results – Federal

Stephanie Carlton, McKinsey & Company

Stephanie Carlton is a healthcare strategist with distinctive experience across three dimensions of the U.S. health care economy - business, policy, and clinical. As an Expert Associate Partner at McKinsey & Company, Stephanie leads McKinsey's Center for U.S. Health System Reform and is a leader in its Medicare Domain. She advises business executives in solving a diverse set of business problems, including mergers and acquisitions, turnarounds, new product launches, operations, big data applications, and strategy. She focuses much of her work on Medicare Advantage growth strategy, with innovative digital and provider-led channels. She speaks and publishes regularly on the business strategy implications of public policy, and she serves on the boards of the Health Care Cost Institute and the University of Texas McCombs Alumni Association. Stephanie holds an MBA from the University of Texas at Austin and completed a nursing fellowship at Georgetown University Hospital.

Regulatory Impacts of Election Results – State

Miranda Motter, America's Health Insurance Plans

In April, Miranda joined America's Health Insurance Plans (AHIP) as Senior Vice President of State Affairs and Policy. In this role she is responsible for AHIP's state policy and advocacy agenda, as well as AHIP's political engagement strategy with state officials, regulatory agencies, and key policymakers. Prior to joining AHIP, Miranda was the President and CEO of the Ohio Association of Health Plans (OAHP), the public voice for the health insurance industry in the state of Ohio, providing thought leadership on policy initiatives that drive improvements for access to high quality affordable health care for the more than 9 million Ohioans covered by OAHP's 15-member health plans. She served in that role for more than 8+ years representing Ohio's commercial, Medicaid managed care and Medicare Advantage member plans on a variety of legislative and regulatory issues before state policymakers and regulators. Under Miranda's leadership, OAHP became a recognized influential opinion leader, strategic thinker and problem solver with policymakers and health care stakeholders.

The U.S. & Global Economic Outlook

Michael Pugliese, Wells Fargo Corporate & Investment Banking

Michael Pugliese is an economist with Wells Fargo Securities. Based in New York City, Michael covers the U.S. economy, with a primary focus on fiscal policy. He plays a lead role in producing the economics team's U.S. and international interest rate forecasts. Michael also contributes to macro commentary on some major foreign economies. His work has been published in academic journals and cited by major media outlets such as The Wall Street Journal, Politico, and Bloomberg News. Michael's contributions have been recognized in two books: The New York Times best seller The Kennedy Half-Century and Economic Modeling in the Post Great Recession Era.

<u>When Trends are Interrupted by a Pandemic: How to use Science to Overcome Fear and Uncertainty</u>

Bill Wooditch, Wooditch Enterprises

After spending a year at a dead-end job with a foreclosed future, Bill Wooditch created his renowned "Always Forward" mindset and forged his way from the impoverished backwoods of western Pennsylvania to create a multi-million-dollar company, which he continues to lead today. He is the author of "Always Forward" and "Fail More," a Wall Street Journal bestseller. The hard-won lessons he shares in his books and keynotes are designed to shorten the distance between where you are now and where you are determined to go in the future.

<u>Why the Chief Modeling Officer Should Have a Seat at the Executive Table</u>

Van Beach, Milliman

Van is a Principal with Milliman, with a focus on providing modeling, valuation, and analytics solutions. He is part of the Life Technology Solutions practice. Van is the lead consultant for several Integrate™ clients and is also responsible for the R&D function, thereby driving the strategy and product roadmap for the practice. Van has been with Milliman since 1998. Van is an FSA with over 25 years of actuarial experience, including 20 years focused on insurance technology. His systems experience spans enterprise administration and financial modeling systems. His career has centered around developing products and leveraging technology to help clients realize business value. He has served in product management, client management, business development, and software engineering roles as well as professional services. Most recently, he was the Product Manager for MG-ALFA before stepping into a leadership role for LTS professional services.

<u>Reporting and Audit Requirements Under VM-20/VM-21</u>

Rachel Hemphill, Texas Department of Insurance

Rachel Hemphill is the PBR Team Lead at the Texas Department of Insurance, working in the Financial Regulation Division. Rachel previously worked as the Chief Systems Actuary at the California Department of Insurance, leading the Office of Principle-Based Reserving. She has 7+ years of regulatory experience and has been very active in PBR Actuarial Report reviews as well as in NAIC task force work for *Valuation Manual* updates.

Stephen Krupa, Moody's Analytics

Steve Krupa has been a Client Relationship Actuary at Moody's Analytics for the last 6 years and prior to that spent 25 years at TIAA-CREF implementing industry leading valuation automation, controls and financial reporting for over $500 billion in Annuity and Life Insurance reserves. He manages current and new prospective AXIS Modeling client engagements by helping to train users in leading edge best practices for building, testing, maintaining, and enhancing AXIS models supporting VM-20 and VM-21. He is a frequent speaker at the Academy of Actuaries PBR Bootcamps and contributor to Academy Work Groups and Practice Notes related to PBR.

Elizabeth Walsh, Deloitte

Elizabeth Walsh is the Life PBR Lead with Deloitte's US actuarial and insurance practice and its Technical Excellence Group. She has led VM-20 implementations and validations with early-adopters in the industry, focusing on ULSG, indexed, and LTC hybrid products. Based out of New York, she has over 15+ years of industry and consulting experience.

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Introduction to Mergers and Acquisitions

Michael Callahan, Oliver Wyman

Michael (Mike) is an Analyst with the Actuarial Practice of Oliver Wyman and is based in New York. His primary responsibilities are to provide actuarial consulting services to a variety of insurance, reinsurance and self-insured organizations. He serves as a support analyst and provides guidance and technical capacity on actuarial assignments. He also produces internal intellectual capital to support marketing and engagement efforts. Mike joined Oliver Wyman this summer. Prior to joining Oliver Wyman, Mike interned at both life and property and casualty insurers.

Sean Meng, Oliver Wyman

Sean is an Analyst with the Actuarial Practice of Oliver Wyman and is based in New York. His primary responsibilities are to provide actuarial consulting services to a variety of insurance entities and organizations. Prior to joining Oliver Wyman, Sean interned at Pacific Life on the internal reinsurance team and worked on their new reinsurance business proposal, and at CUNA Mutual Group on the product management team. Sean graduated with distinction from University of Wisconsin-Madison with a Bachelor of Business Administration degree in Actuarial Science, Finance and Risk Management.

Ellen Smith, Oliver Wyman

Ellen is an Analyst in the New York office of Oliver Wyman's Life Actuarial practice. Her primary responsibilities are to provide actuarial consulting services to various insurance entities and organizations. Ellen joined Oliver Wyman in July 2019 after a year of experience interning at Global Bankers Insurance Group on the annuity pricing team. She graduated from the University of North Carolina in Chapel Hill in May 2019 with a Bachelor of Science in Statistics and Analytics and a minor in Computer Science.

Pricing Evolution

Simon Gervais, Oliver Wyman

Simon Gervais is a Consultant with the Actuarial Practice of Oliver Wyman and is based in Hartford. His primary responsibilities are to provide actuarial consulting services to various insurance entities and organizations. Over the last three years, Simon has supported multiple pricing and PBR-centric projects along with Oliver Wyman's 2019 PBR Survey. He graduated from the Université du Québec à Montréal with a Bachelor of Science in Actuarial Science in December 2014.

Considerations for COVID-19 – Analyzing, Reserving, Pricing, and Capital & Surplus from a Health Insurer's Perspective

Haitham Aly, Milliman

Haitham is an associate actuary with the Atlanta office of Milliman. He has over 8 years of experience as a health actuary. Prior to joining Milliman, he spent two years working for a health insurance carrier. Haitham has worked with a variety of health insurance carriers in both the Commercial and Medicare Advantage space as well as provider organizations to assist in developing solutions and strategies.

Phil Ellenberg, Milliman

Phil is a healthcare consultant with the Atlanta office of Milliman. He has over 10 years of experience working with self-insured employers. Prior to joining Milliman, he held positions as an appeals analyst reviewing medical, pharmacy, and disability claim appeals and as an ERISA paralegal. Phil assists employers and brokers of various sizes with analytics and strategy related to administering self-funded plans by promoting novel solutions using predictive analytics techniques and business intelligence software.

David Hayes, Milliman

David is a principal and consulting actuary with the Atlanta office of Milliman. He has over 25 years of experience as a health actuary. In addition to his time with Milliman, David also spent several years at Anthem working in the individual, small group, and Medicare lines of business. David works with many different health insurance carriers and provider organizations. He assists clients in developing and evaluating strategies in the commercial, Medicare, and Medicaid markets.

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Drug Adherence

Michael Forster, Wakely Consulting Group

Michael Forster, ASA, MAAA works in the New York office of Wakely Consulting Group, LLC. Michael joined Wakely in 2016 and is currently a consulting actuary. He has worked on Medicare pricing and reporting, including the certification of bid pricing tools and as a de-facto Medicare lead consultant for an HMO plan in support of their monthly financials. Recently, Michael has focused on provider analytics and reporting, focusing his time on operational analytics for drug adherence, risk score documentation, provider management, clinical management, and quality improvement. Other projects include Medicaid rate setting, Medicaid rate negotiations, and M&A work. He has presented on a number of SOA webinars and presented at RISE conferences throughout his career.

2021 ACA Outlook

Gregory Fann, Axene Health Partners

Greg Fann is a consulting actuary with Axene Health Partners. He works with insurers, providers, state agencies, attorneys and policy groups. Greg and his wife Angie reside in Temecula, California.